

Rowan University

Rowan Digital Works

Theses and Dissertations

5-14-1996

A study of meeting planners' tactics to market conferences, seminars, and workshops

Erika March

Rowan College of New Jersey

Follow this and additional works at: <https://rdw.rowan.edu/etd>



Part of the [Public Relations and Advertising Commons](#)

Let us know how access to this document benefits you -
share your thoughts on our feedback form.

Recommended Citation

March, Erika, "A study of meeting planners' tactics to market conferences, seminars, and workshops" (1996). *Theses and Dissertations*. 2318.

<https://rdw.rowan.edu/etd/2318>

This Thesis is brought to you for free and open access by Rowan Digital Works. It has been accepted for inclusion in Theses and Dissertations by an authorized administrator of Rowan Digital Works. For more information, please contact LibraryTheses@rowan.edu.

A STUDY OF MEETING PLANNERS' TACTICS TO MARKET CONFERENCES,
SEMINARS, AND WORKSHOPS

by
Erika March

A Thesis Project

Submitted in partial fulfillment of the requirements of the
Master of Arts Degree in the Graduate Division of Rowan
College of New Jersey
May 14, 1996

Approved by _____ Professor

Date Approved 5-14-96

ABSTRACT

This study identified, through secondary research and a written survey, methods to effectively market meetings. The research found patterns in the areas of Communication, Direct Mail, Program Planning, Feedback/Evaluation, and Follow-up. These research areas were used in forming the structure of the survey questions.

The meeting planning survey was sent to 17 meeting planners who were chosen based on a June 1995 ranking in Meeting News as "The 25 Most Influential People in the Meetings Industry." The 25 represent different types of planners in different industries. These planners were surveyed to obtain marketing ideas from the top meeting planners in the industry.

The survey results created a marketing guide of meeting planners' tactics to market conferences, seminars and workshops for independent, association and corporate planners. Meeting planners, who have the responsibility to plan meetings and conferences, may use this study a guide for marketing meetings. This guide will be useful to planners looking for new marketing ideas to apply to their own meetings.

MINI-ABSTRACT

This study identified, through secondary research and a written survey, methods to effectively market meetings. 17 well-known meeting planners in the industry were surveyed to obtain marketing ideas. The survey results created a marketing guide of meeting planners' tactics to market conferences, seminars and workshops for independent, association and corporate planners.

TABLE OF CONTENTS

	<u>PAGE</u>
Acknowledgments.....	i
Chapter 1	
Importance of the Problem.....	1
Problem Statement.....	2
Delimitations.....	4
Purpose of the Study.....	4
Procedure.....	5
Terminology.....	7
Chapter 2	
Literature Review.....	9
Chapter 3	
Study Design.....	16
The Survey.....	17
The Questions.....	18
Data Analysis Method.....	22
Chapter 4	
Data Analysis.....	24
Communication.....	25
Program Planning.....	31
Feedback/Evaluation.....	36
Chapter 5	
Summary and Interpretation.....	39
Findings Related to Guide.....	40
Deficiencies.....	42
Recommendation.....	44
Bibliography.....	47
Appendix.....	48

Special thanks to...

Professor Anthony Fulginiti for his guidance and support through my internship and thesis project.

Janice Ford Benner, my mentor and friend, for her knowledge, comfort and support.

My parents and sister, Stacey, for their love and faith in me throughout my graduate studies.

Chapter 1

Importance of the Problem

A meeting planners' goals are producing successful workshops, conferences and seminars. A meeting planner is responsible for site selection, negotiating contracts, and planning throughout the event. These workshops, conferences, and seminars involve groups of various sizes and types of organizations. But there is one similarity with these different types of meetings. The success depends upon effective marketing.

"Good program planning does not happen by accident. Rather, it is a result of a series of carefully thought-out strategies that consider the needs of the market and your own organization." ¹

Without effective marketing, a meeting may have to be canceled because of insufficient registrants or lack of interest. With the great number of meetings and conventions planned yearly, it is necessary to keep up with the latest trends in marketing to sustain or increase meeting

attendance. Lisa Grimaldi verifies the importance of marketing in meeting planning.

"Coaxing people to your association's meetings is always a challenge. And getting even more people to your big convention--which you are undoubtedly under pressure to do--is really one tough bit of business."²

In a recent survey released by the American Society of Association Executives (ASAE), 1996 will be the strongest year in the meeting and convention industry. Meetings for 1995 are 25 percent above the number of meetings in 1994 and according to the survey, there will be 41 percent more meetings in 1996 than in 1995.³ Marketing these meetings will become increasingly important.

Anver Suleiman, President of The Marketing Association, in St. Petersburg, Florida envisions a healthy future for meetings.

"We're in the information age. There's just no doubt in my mind that we're in a field that is growing at a phenomenal rate that no one is capable of measuring."⁴

Problem Statement

Planning and running successful meetings is a meeting planner's primary goal. Successful, in this context, means getting attendees to come and satisfying them. The "getting them to come" part is more difficult.

"In this era of tightened budgets and crammed schedules how can you build attendance? The answer is not in the programming, the speakers, or the destination itself. As elementary as it sounds, the answer is selling the event and all of its myriad elements."⁵

Selling the event includes selling the event to the right target audience. The most effective way to draw attendees is through a direct mail campaign. Robert Simerly, Dean of Lincoln Continuing Studies at the University of Nebraska, comments on reaching potential participants through direct mail.

"One of the most important keys to getting the number of registrants needed to break even is defining the best possible mailing list and mailing enough brochures to attract registrants." ⁶

Simerly says,

"Mailing list selection, maintenance and tracking is both an art and a science. It takes time and money in order to achieve excellence in this area so the allocation of these resources must be planned for. Giving careful attention to this important aspect of direct-mail marketing will reward you with more registrants and reduce your marketing costs in relation to income generated. By targeting your audience more effectively and tracking their responses, you can greatly enhance all of your marketing efforts." ⁷

The scramble for attendees is nothing new. A 1992 Meetings Market Study reported that attendance in 1992 was 36.4 percent down from 1989. ⁸

"It's easy for association members to forget about annual conventions. Associations had enjoyed almost guaranteed attendance during the bullish '80s now have to work a little harder and be careful to select destinations that are going to entice people".⁹

Suleiman has advice for generating attendance and meeting loyalty. "New things have to be offered for people to want to walk those aisles. Not gimmicks, but substance. Information. Education. People. Insights. Networking."¹⁰

Delimitations

This study was limited to the responses from key players in the meetings, convention, trade show and incentive travel industries.

The study was limited to responses in the following areas of marketing: (1) Communication; (2) Direct Mail and Mailing Lists (3) Program Planning; (4) Feedback/Evaluation; and (5) Follow-up. This study will address only meeting planners' recommendations for successful marketing techniques in the meeting planning industry. This study will not investigate the attitudes of attendees, exhibitors, or any other individuals involved the meeting planning process.

Purpose of the Study

The purpose of this study was to create a guide for effective marketing in meeting planning for independent, association, and corporate planners. According to several meeting planners, no marketing guide of this kind exists in the industry.

The author spoke to three planners (an independent, corporate and association planner) who agree this is a good idea. One corporate meeting planner says, "That is a very interesting idea. We could use something like that."

By surveying the key players in the meetings industry, suggestions for effective marketing from the experts can be compiled into a marketing guide for meeting planners. These key players have the best ideas. These ideas are transferable and will be valuable to all planners in the industry. The results will be suitable for meeting planners who have the responsibility to plan meetings and conferences of any size or type of organization. A guide including expert testimony will be a valuable addition to the literature.

Procedure

The author began by reviewing the literature available on the topic through a computer search of CD ROM indexes, books, journals, and newspapers at the library at Rowan College of New Jersey and the library at the University of Pennsylvania. The author searched over 100 sources. The secondary research revealed the importance of the topic and the need for the study.

The author also contacted Meeting Professionals International (MPI), an organization of individuals in the meetings profession committed to an excellence in meetings. MPI has a resource center on-site containing related articles. 20 articles on marketing in meeting planning were obtained from the resource center.

In conclusion, the investigation also included conversations with several meeting planners across the country to gain insight on their opinion of the study. These planners verified the importance of marketing in meeting planning.

Terminology

Meeting Planners: Representatives of a travel agency or corporation responsible for planning a meeting or conference.

Meeting: Any type of gathering involving five or more people, such as a conference, workshop or annual meeting.

Attendees: People who attend meetings, conferences, workshops or seminars.

Marketing: The task of identifying proper prospects and reaching those prospects with the sales message and the development of an effective strategy to make sales success possible.

Chapter 1

Notes

1. Simerly, Robert. Planning and Marketing Conferences and workshops: Tips, Tools, and Techniques. 1st ed. San Francisco: Jossey-Bass, 1990, 6.
2. Grimaldi, Lisa. "Upping the Numbers." Meetings & Conventions, August 1994, 38-52.
3. Priscilla Lynn and Tom Gorski. "1996 To Be Strongest Year for Meeting Professionals" (Press Release, Meeting Professionals International) June 26, 1995.
4. "For Convention Success: Just Add Marketing" (Marketing Expert Anver Suleiman) (Interview) Association Management, Jan. 1995, 40-45.
5. Grimaldi, 38.
6. Simerly, 32.
7. Simerly, 57.
8. Alonzo, Vincent "Convention Marketing: Remember the Bureau." Meetings & Conventions, Feb. 1992, 51-62.
9. Alonzo, 52.
10. "For Convention Success: Just Add Marketing", 45.

Chapter 2

Literature Review

This study involved an extensive literature search. The secondary research consisted of research through computer databases including CD ROM, business abstracts, theses abstracts, dissertation abstracts, and other computerized card catalogs. The author searched for books, business magazines, management publications, and newspaper articles. The author used keywords such as "meetings," "meeting planners," "conferences," "seminars," "meeting planning," "workshops," and "marketing meetings." These searches were conducted through indexes available at Rowan College of New Jersey, Glassboro, New Jersey, Camden County Library, Voorhees, New Jersey, and the University of Pennsylvania, Philadelphia, Pennsylvania. The author also searched the Internet using the same key words as above.

The literature search revealed a considerable amount of material on the topic of planning meetings. This material consists of books and journal articles describing the best tactics for conducting workshops, conferences, or seminars.

These tactics include developing a meeting plan, timetables for meeting planning, and guides for meeting planning from start to finish. These writings help meeting planners improve their meetings through tips for site selection, themes and catering. Organization is key for meeting planners. Therefore, the literature available is extremely useful to planners who need guidelines to carry out a meeting and remain focused on their meeting objectives. Meeting planners can retrieve basic planning information through these documents.

Less information was available, however, specifically describing the marketing of meetings. The author's contention is that if meetings are not properly marketed, they won't be well attended. With the great number of meetings and conventions planned yearly, planners must keep up with the latest trends in marketing to sustain or increase meeting attendance. Usually, attendees have a range of meetings they can attend; thus the marketing effort is more competitive. The author's purpose in this study is to focus on the importance of the marketing effort versus the importance of planning meetings details.

The secondary research served two purposes. First, the author confirmed the importance of the topic of meeting planning and gathered background information on the subject. Second, the author confirmed the need for the study because of the limited information available on marketing meetings.

The author found some information in both business publications and management textbooks. These sources offered insight on how to reach potential participants with marketing suggestions. Planning and Marketing Conferences and Workshops by Robert G. Simerly (Jossey-Bass, 1990) is a handbook to assist meeting planners in planning conferences from start to finish.¹ The book includes over 175 tips for planning conferences. This textbook includes eight chapters ranging in topic from program design and development to negotiating contracts. One chapter is devoted solely to reaching potential participants. This chapter deals only with the direct mail aspect of marketing.

According to the literature search, this is the most recent textbook dealing with marketing and meeting planning. The author did not find any textbooks or handbooks dealing specifically with the marketing aspect of meeting planning. The author searched the resource center of Meeting Planners International (MPI) and the resource center of the American Society of Association Executives (ASAE). No textbooks dealing specifically with the marketing aspects of meeting planning were found.

Simerly's focus on direct mail advertising is in addition to his feelings about the importance of program development and planning. The author found several articles which discuss the value of successfully marketing meetings and conferences through program planning.

"Putting the Motion in Meeting Promotions" by Katherine L. George, CAE writes about the importance of program planning. Frank Wolfe, CAE and meeting planner for the International Association of Hospitality Accountants Inc. believes the worst mistake that associations make in promoting meetings is poor planning. "I have heard stories of associations who spend really big bucks on great speakers and beautiful locations and still end up with low attendance. Although the speakers were great, the information was not timely or needed."² Wolfe also recommends tips for promoting meetings including research, using different methods of dissemination and trying out new ideas.

The big question for meeting planners today is put very eloquently by James J. Groome in "Marketing your Meetings." Groome says, "If you set the convention, will they come? Or more precisely, will they come in sufficient numbers to allow your sponsoring organization to make budget? That, indeed, is the \$64 question for today's association planners."³ Groome agrees with the tips suggested by Wolfe but is more descriptive through key concerns for the future of successful meetings. Groome describes five important issues in regard to marketing meetings. 1. Program. How does it relate to the specific needs of an audience? This is where he is in total agreement with Wolfe's discussion of the timeliness and need for programs. 2. Audience. Has someone taken into consideration the psychographic, geographic and demographic

needs of the audience? 3. Site. Is the site easily accessible? 4. Expense. Is the cost of the program equal to the value of the program? 5. Promotion. Is the promotion of the event exciting and will it entice potential participants?

The most valuable article found through the literature search is "Upping the Numbers." by Lisa Grimaldi. It is the single article most related to the study. Its focus is on how to get the potential attendee into the meeting room. It provides methods such as direct marketing, support from the convention bureau, and research. Direct marketing, in this context, focuses not only on direct mail marketing but also on faxes which "create a perception of high priority information, so people are more likely to look at them than brochures." ⁴

"Promo Pieces That Pull Them In" by Jennifer Juergens and "Why No One can Read Your Brochures" by Dave Migdal both discuss the importance of effective brochures. Migdal says, "They can make the difference between a well-attended, money-making convention and one that barely makes ends meet."⁵ Juergens agrees, "Sending out materials that pack the punch is one way to get your members to the meeting."⁶

Michael Kulczycki and Jeanne Farrell developed a 14-step marketing method after a four-year process of trial and error. They recommend beginning with an identification of the attendee needs. Then they recommend the development of a

marketing strategy by planning, positioning and promoting the event to meet those needs. Finally, they suggest an evaluation of the process to pinpoint what worked and modify what didn't.⁷

The existing research lacks significant discussion about marketing and its role in meeting and conference planning. The lack of existing research provides support for a new study and shows the need for more extensive research on this topic. This new research will add to the current body of knowledge. Information about the following areas will be available through this study:

- Communication Techniques
- Direct Mail
- Publications and Design
- Mailing Lists
- Program Planning
- Feedback/Evaluation

Chapter 2

Notes

1. Simerly, Robert. Planning and Marketing Conferences and workshops: Tips, Tools, and Techniques. 1st ed. San Francisco: Jossey-Bass, 1990.
2. George, Katherine L. "Putting the Motion in Meeting Promotions." Association Management, February 1993, 147.
3. Groome, James J. "Marketing your Meetings." Association Meetings. 68.
4. Grimaldi, Lisa. "Upping the Numbers." Meetings & Conventions, August 1994, 38-52.
5. Juergens, Jennifer. "Promo pieces that pull them in; sending out materials that pack a punch is one way to get your members to the meeting." Meetings & Conventions, July 1988, 33.
6. Migdal, Dave. "Why no one can read your brochures." Meetings & Conventions, August 1992, 34.
7. Kulczycki, Michael and Farrell, Jeanne "Planning your Convention's Success." Association Management. September 1990, 49.

Chapter 3

Study Design

By surveying the key players in the meetings industry, suggestions for effective marketing from the experts can be compiled into a marketing guide for meeting planners.

A survey was written and sent to 17 meeting planners. These individuals were chosen based on a June 1995 ranking in Meeting News as "The 25 Most Influential People in the Meetings Industry." The 25 represent different types of planners in different industries. They were chosen after Meeting News sent faxes to 2,000 readers and polled its advisory board. The 25 finalists garnered the most frequent mentions, by virtue of their continued leadership, vision and energy.¹ Only 17 of the 25 listed individuals were chosen because some of the individual position descriptions were unrelated to this study (only meeting planners were selected).

Once the 17 planners were chosen, the author referred to the Meeting Planners International (MPI) directory for the addresses of each of these individuals. Each address was

verified by telephone. A cover letter was written to accompany the survey. This letter was prepared to achieve maximum response. The author felt that mentioning the sample's listing in Meeting News as one of "The 25 Most Influential People in the Meetings Industry" would generate a better response rate. The author chose to send the survey by Federal Express courier. There were two reasons: it would guarantee arrival; and second, it would stress to the receiver the importance of the study to the author. The author mentioned in the cover letter that the expense of sending each survey Federal Express would signal that the information was essential to the success of the study.

The Survey

The survey was written and field tested by a meeting planner to ensure its accuracy and readability. The survey and cover letter was sent and each survey included two self-addressed stamped envelopes. The author included a larger envelope for additional material the respondents offered about any survey area. Respondents were asked to answer the questions completely and thoughtfully. They were told they would not be identified and their responses would remain confidential. The author's phone number, fax and e-mail address were given for questions. The meeting planners were thanked for their cooperation.

The Questions

The survey included common criteria uncovered in the literature search. The survey asked questions in specific areas of Marketing: "Getting the Word Out, " "Getting the Audience In" and "Getting the Audience Back."

The survey was four pages in length and included 26 questions. The first two pages dealt with "Getting the Word Out" and included 9 questions. The first heading under this section included questions about communication. Questions 1-3 asked about techniques of communication respondents use to market and advertise their meetings. Question 1 asked about techniques such as direct mail, Internet, radio ads, print ads, faxes or telephone. Question 2 then asked respondents to rank these techniques of communication in order of importance from 1-6 (1 being the highest). Question 3 was an open-ended question about which techniques respondents felt were most effective and why.

The second heading under this section included questions about Direct Mail and Mailing Lists. Questions 4-9 asked about the timing and frequency of promotional materials and about the use of mailing lists. Question 4 asked how early respondents promote their meetings. This question was divided into different types of meetings because the author felt timing would differ depending on the type of meeting. This was divided into annual conferences, seminars, workshops and symposia. A grid asked respondents to check off the amount of time given to mail promotions for the above types

of meetings (12-24 months, 9-11 months, 6-8 months, 3-5 months, 1-2 months). Question 5 asked how many brochure mailings respondents feel are necessary to get the word out. Respondents were asked to check a certain number of mailings. Question 6 was an open-ended question which asked if respondents felt that repeat mailings were helpful and to explain why. Question 7 asked respondents how they make their repeat mailings stand out from the first mailing (size, color, shape) and if they use repeat mailings. Question 8 asked how respondents update their in-house mailing lists. Question 9 asked if respondents target their past and potential attendees alike.

The second section dealt with "Getting the Audience In" and included 9 questions. The sub-heading under this section included questions about Program Planning. Questions 10-18 asked about defining a target audience, attendee needs and attendee planning patterns, preferred attendee calendar for meetings, modernizations in marketing meetings, and planning and marketing an undesirable site.

Question 10 asked how respondents defined their target audience and to specify the method they use to define their target audience. Question 11 asked how respondents determine their attendee needs. Questions 10-11 were open-ended. Question 12 asked how early respondents feel attendees begin to plan for a meeting or conference. The responses listed were "12-24 months," "9-11 months," "6-8 months," "3-5

months," "1-2 months." Question 13 asked how early individuals register for meetings after receiving promotional material. The responses listed were "within a week," "two weeks," "three weeks," "four weeks," "five weeks," "six weeks or more." Question 14 asked if respondents consider the following prior to program planning: geographic data, demographic data, psychographic data. Respondents were asked to rank these in order of importance.

Question 15 asked what respondents believe is the preferred attendee calendar for meetings. This question was divided into different types of meetings because the author felt there might be a different preferred calendar depending on the type of meeting. This was divided into annual conferences, seminars, workshops, and symposia. A grid was developed and asked respondents to check off the following for the above types of meetings: "Weekend (Saturday-Sunday)," "Full Week (Monday-Friday)," "Weekday (Monday-Tuesday)," "Weekday (Thursday-Friday)." Question 16 asked respondents to rank the following in order of importance: topic, reputation of organization, location, recreational activities and date. Respondents were asked to rank these in order of importance from 1-5, 1 being the highest. Questions 17 and 18 were open-ended questions which asked what was the most successful modernization respondents have seen in marketing meetings and how respondents market a site that is not well-known.

The third section dealt with "Getting the Audience Back" and included 8 questions. The sub-headings under this section included Feedback/Evaluation and Follow-up. Questions 19-21 dealt with evaluation forms. Questions 22-26 dealt with follow-up with attendees after a meeting.

Question 19 asked if respondents ask their attendees to complete evaluation forms after meetings. The choices in this section were "Always," "Sometimes," and "Never." Question 20 asked if respondents use evaluations from past meetings to plan future meetings. The choices in this section were "Always," "Sometimes," and "Never." Question 21 asked if these evaluations achieved any of the following: increased attendee satisfaction, increased attendance or improved topic ideas. Question 22 asked if respondents call attendees after a meeting to assess satisfaction. The choices in this section were "Always," "Sometimes," and "Never." Question 23 asked if respondents send thank-you letters to attendees after a meeting. The answers in this section were "Always," "Sometimes," and "Never." Question 24 asked if respondents research why people do not register for their meetings. Question 25 asked how beneficial it would be to ask people why they didn't register for their meetings. The choices were the following: "Very Beneficial," "Somewhat Beneficial," "Neutral," "Not Very Beneficial," "Not Beneficial." Question 26 was an open-ended question asking if respondents thought it was beneficial to ask people why

they didn't register for their meetings and how would respondents obtain this information.

Data Analysis Method

The author received 14 of the 17 completed surveys from meeting planners. Two of the surveys were returned incomplete because the recipients did not feel they were qualified to answer the survey questions. The author tried to contact the three missing survey recipients but did not receive a response. Therefore, the total number of respondents was 12.

The author analyzed the data from the 12 surveys. The author took each question and compiled the answers by medium and frequency. Each survey question is reported separately.

The author noted that many of the respondents did not answer questions as intended. For example, questions with forced answer choices, some of the respondents took the liberty to choose more than one answer. Therefore, in some of the questions, there are more than 12 reported answers which would coincide with the number of reported respondents. Questions with open-ended answers were summarized and repeat answers were noted.

Notes

1. Staff of Meeting News "The 25 Most Influential People in the Meetings Industry." Meeting News, June 12, 1995. 18-38

Chapter 4

Data Analysis

The data obtained from the meeting planning survey was compiled and translated into text and charts. In some areas of the survey, tables were used to obtain data. Respondents were asked to complete tables to indicate methods they use in order of importance and their effectiveness compared to other methods.

The author noted that many of the respondents did not answer questions as intended. For example, in questions with forced answer choices, some of the respondents took the liberty to choose more than one answer. Therefore, in some of the questions, there are more than 12 reported answers which would coincide with the number of reported responses not the number of total respondents.

Communication

The meeting planners were asked which of the following techniques they use to market meetings: Direct Mail, Internet, Radio Ads, Print Ads, Facsimile and Telephone. All meeting planners use direct mail for marketing. Nine planners use facsimile. Seven planners indicated they use print ads and telephone. Four planners have used the Internet. None of the planners use radio advertising.

The planners were asked to also rank these techniques in order of importance. Table 4.1 shows the frequencies and percentages of the rankings.

Table 4.1 Row/Column

Ranking#	1		2		3		4		5		6	
	N	%	N	%	N	%	N	%	N	%	N	%
Direct Mail	10	91/91	0	0/0	1	9/9	0	0/0	0	0/0	0	0/0
Internet	0	0/0	0	0/0	1	9/11	5	56/56	3	38/33	0	0/0
Radio Ads	0	0/0	0	0/0	0	0/0	0	0/0	0	0/0	6	100
Print Ads	0	0/0	3	27/33	1	10/10	1	11/10	4	50/44	0	0/0
Faxes	0	0/0	6	55/55	4	36/36	0	0/0	1	12/10	0	0/0
Telephone	1	9/10	2	18/20	4	36/40	3	33/30	0	0/0	0	0/0
Total	11	100	11	100	11	100	9	100	8	100	6	100

10 of the 11 respondents ranked Direct Mail as number one. Six of the 11 respondents rank facsimile as number 2. Faxes and telephone tie for the number 3 position with four of 11 respondents selecting those techniques.

The planners were asked to choose which of the communication techniques were the most effective and why. As can be seen above, Direct Mail was the most popular way to market meetings. Eleven of the respondents responded to this question. Seven planners described Direct Mail as the most effective. "Direct Mail allows a complete presentation of offering and benefits (assumes that you) can get recipients to "open" mail. Meetings need "detail" for effective promotion." One respondent stated that 90 percent of their registrants come from Direct Mail. Another respondent uses in-house mailing lists which are extremely effective. "Our mailing lists are compiled primarily from inquiries to our office. This gives us a highly targeted audience with a pre-set interest in our meetings. Our direct mailing is very effective."

Other techniques were also mentioned. One respondent mentioned a choice which was not provided. "A choice not offered was "word of mouth." This is the best ad." One respondent said the Internet is too new to evaluate and print ads create and generate a strong sales message in the marketplace.

Direct Mail and Mailing Lists

The planners were asked how early they mail promotions for meetings. The answers were sub-divided between the different types of meetings: Annual Conference, Seminar, Workshop and Symposium.

Annual Conference

Four of the 12 respondents send promotions for annual meetings 12-24 months prior to the date of the conference. Four of the 12 respondents send mailings 6-8 months prior to the date of the conference. Three of the 12 respondents send mailings 3-5 months prior to the date of the conference. One planner only sends 1-2 months prior to the conference.

Seminar

Four of the 11 respondents send promotions for seminars 6-8 months prior to the date of the seminar. Five of the 11 respondents send mailings 3-5 months prior to the date of the seminar. Two planners send 1-2 months prior to the seminar.

Workshop

Four of the 11 respondents send promotions for the workshops 6-8 months prior to the date of the workshop. Five of the 11 respondents send mailings 3-5 months prior to the date of the workshop. Two planners send 1-2 months prior to the seminar.

Symposium

Four of the 10 respondents send promotions for symposia 6-8 months prior to the date of the workshop. Five of the 10 respondents send mailings 3-5 months prior to the date of the symposium. One planner sends 1-2 months prior to the symposium.

Table 4.2 shows the frequencies and percentages of the rankings.

Table 4.2

Months	12-24		9-11		6-8		3-5		1-2		Total Row N %
	N	%	N	%	N	%	N	%	N	%	
Annual Conference	4	33			4	33	3	25	1	9	N=12 100
Seminar	0				4	36	5	45	2	19	N=11 100
Workshop	0				4	36	5	45	2	19	N=11 100
Symposium	0				4	40	5	50	1	10	N=10 100

The planners were asked how many brochure mailings they feel are necessary to get the word out to potential attendees. The answers given were in the following checklist form: One, Two, Three, Four, More than Four. Five of the 12 respondents chose two times, two of the respondents chose three times, four of the respondents chose four times, and one respondents said one mailing was enough to get the word out.

When asked if repeat mailings were helpful, 100 percent of the sample responded in the affirmative. 10 of the 12 planners had comments about repeat mailings. One planner put it best. "Reinforce, Reinforce, Reinforce." Repeat mailings are perceived as helpful if you can show brisk registration and attendance by key participants and suppliers. Two planners suggest to follow up on detail with a second mailing. They can hold the date with the first mailing and

then see meeting content information and a sign up for sessions with the second mailing. One planner feels strongly about the importance of second mailings. "The level of importance a potential attendee perceives a meeting to be is helped by the number of times he or she is exposed to the offering." Two planners feel second mailings should be well-planned. "From a large mailing list, we send a repeat mailing to a select 10 percent. This may be useful to the 10 percent that receive it." All mailings should be "strategically planned, each representing a targeted message. You do not want the audience to toss what is perceived as the same old thing."

If you do repeat mailings, how do you make your repeat mailings stand out from the first? (e.g. color, size, shape)

One planner doesn't change anything in a repeat mailing but most planners have different ideas for repeat mailings. Two planners use the first mailing as a teaser with a few details (save the date card) and then use the second one as a "full detail of information." Three planners have used different colors, size and shape for second mailings. As one planner puts it, "I have used all of the above. The trick is to be sure prospective attendees know the importance of the program and its history." Another planner agrees. "Color, shape and size all work and more program details as time-out decreases." One planner feels color is the most important in regard to second mailings. "All need to be consistent in

size with the exception of final drop. Color lends itself to quality product." One planner mentioned the idea of each mailing being completely different pieces such as CD ROM, then video, then paper. Bolded announcements and different fonts were other suggestions.

How do you update your in-house mailing lists?

Planners were then asked how they update their in-house mailing lists. One planner uses the NCAO-National Change of Address service. Two planners do normal maintenance and corrections in-house. Two planners use membership lists and delete members who have not continued membership. Reply cards and registration are another popular way used for updating.

Do you target past and potential attendees alike?

The planners were asked if they target past and potential attendees alike. 85 percent responded "yes" and 15 percent no. One planner made an interesting and somewhat obvious point. "We do because lists are not often cleaned up and they are not effective enough to target two different groups."

Program Planning

How do you define target audience?

Planners were asked how they define their target audience. Five of the 11 respondents use membership lists for the target audience. One planner has it easy as the customer defines the audience or if it is internal, the subject defines who will attend. Many planners mentioned the use of research as an important entity in defining the target audience. Three planners mentioned the analysis of industry, trade events, and supplier sources. They also use buyers and sellers in the industry and readers of trade publications in industry members.

How do you determine your attendee needs?

Determining attendee needs is an important factor in meeting planning. 11 planners responded to this question. Seven of the 11 respondents use evaluation forms and surveys to determine needs. Four planners mentioned the use of focus groups, membership surveys, responses to past evaluations, and industry trends. Two planners reported that the client tells them about the attendee needs. One planner's association has a needs assessment program. "Our association stays current in trends which would impact our members, we ask for feedback and we have members assist in program planning."

In your experience, how early do attendees begin to plan for a meeting or conference?

Two planners responded that this was very subjective depending on the size of the meeting but Table 4.3 shows the overall frequencies and percentages. 28 percent reported that based on their experience, a one-two year time line was standard.

Table 4.3

Months	#	%
12-24 months	5	28
9-11 months	2	12
6-8 months	4	24
3-5 months	4	24
1-2 months	2	12
Total	17	100

In your experience, how early do individuals begin to register after receiving promotional material for a meeting?

All 12 respondents answered this question. As one planner pointed out, "This varies, if airline ticketing is included, special fares, or seminar sign-ups." 31 percent of respondents answered that individuals begin to sign up after two weeks. "Within a week" and "Six weeks or more" were both reported by 23 percent of the population. 15 percent reported five weeks and eight percent said four weeks.

Which of the following do you consider prior to program planning? (Please rank 1-3 in order of importance, 1 being the highest)

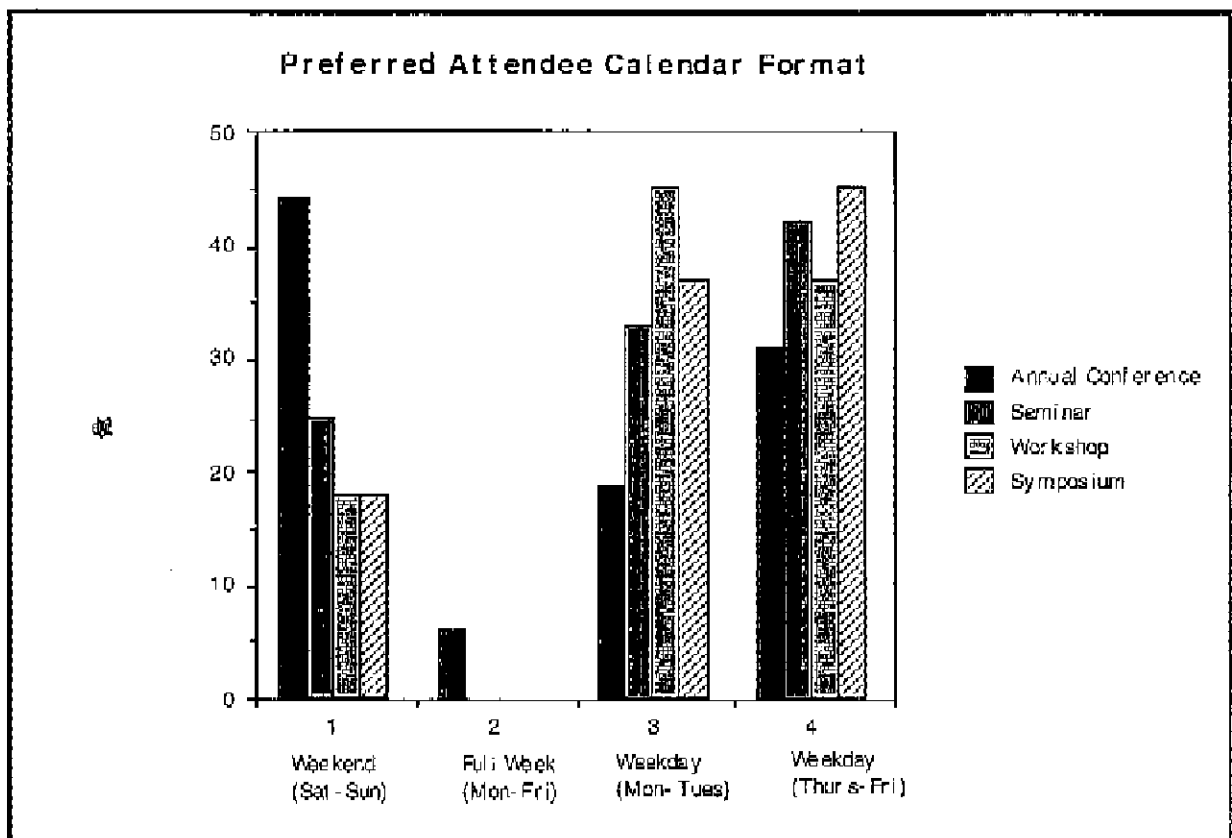
Six of the 11 respondents chose "Demographic Data" as #1 in importance in program planning. As shown in Table 4.4, the #2 position was tied with 3 of the nine respondents choosing each of the categories. The # 3 position was "Psychographic Data" with 66 percent of the vote.

Table 4.4

Ranking #	Geographic data		Demographic data		Psychographic	
	N	%	N	%	N	%
1	5	46	6	67	0	0
2	3	27	3	33	3	33
3	3	27	0	0	6	67
Total	11	100	9	100	9	100

In your experience, what seems to be the preferred attendee calendar for meetings?

All 12 respondents answered this question. Graph 4.5 shows the different preferences for meetings based on times of the week. 44 percent prefer the annual meeting to be on a weekend (Saturday-Sunday) whereas 45 percent prefer a workshop to be held during the week (Monday-Tuesday). The preferred format for a symposium is late in the work week (Thursday-Friday). A full-week for a meeting in general was not popular but 6 percent did respond to having an annual meeting for a full week but the weekend is preferred.



Graph 4.5

Please rank the following in order of importance in marketing meetings. (please mark 1-5, 1 being the highest)

Topic
 Reputation of organization
 Location
 Recreational activities
 Date

11 planners responded to this question. Five of the 11 respondents chose topic as #1 in marketing meetings.

Reputation of the organization came in as #2 with 45 percent of the vote. Location and date were matched for #3 and #4 with four of the 11 planners choosing those factors.

Recreational activities was #5 to nine of the eleven

respondents. One planner suggested cost as the number one factor in importance which was not listed as a choice.

What is the most successful modernization you have seen in marketing meetings?

10 of the 12 respondents answered this question. The popular modernization in marketing meetings is the Internet with seven of the 10 respondents describing different ideas for the use of the Internet. Some of the ideas mentioned by three of the planners were registration and advertising via Internet. Also, one respondent thought the use of the fax machine to register people was a successful modernization. CD technology was also mentioned by two respondents.

How do you market a meeting site that is not well-known or easily accessible?

11 of the 12 respondents answered this question. Four respondents simply said to avoid this problem--just don't go to unknown sites. However, three respondents suggested to "market the program not the site." As one planner said, "Market the uniqueness of the offering. Tie in the location to the uniqueness of the programming." Another planner suggested to send a brochure to explain ease of access and "highlight other parts of the conference." Two planners suggested that you carefully choose your target audience.

Feedback/Evaluation

Following your meetings, do attendees complete evaluation forms?

Always	7	58%
Sometimes	5	42%
Never	0	0%

Do you use evaluations from past meetings to plan future meetings?

Always	12	100%
Sometimes	0	0%
Never	0	0%

All of the 12 respondents always use evaluations from past meetings to plan future meetings.

Have these evaluations achieved any of the following?

Increased attendee satisfaction

Yes 12 100%

Increased attendance

Yes 10 83%

No 2 17%

Topic ideas (improved topics)

Yes 12 100%

Follow-up

Do you call attendees after a meeting to assess satisfaction?

Always	3	25%
Sometimes	5	42%
Never	4	33%

Three of the 12 respondents call attendees after a meeting to assess satisfaction. This is only 25 percent of the population. 33 percent never call attendees and 42 percent sometimes call. It is promising to think that 67

percent of the respondents do conduct telephone follow-up which is beneficial research.

Do you send thank-you letters to attendees after a meeting?

Always	4	33%
Sometimes	3	25%
Never	5	42%

Five of the 12 respondents never send thank-you letters to attendees after a meeting. However, 33 percent always find the time and 25 percent sometimes send thank-you letters. As one planner said, "This is time well-spent."

Does research tell you why people do not register for your programs?

Yes	8	67%
No	4	33%

Eight of the 12 respondents report that research does explain why people do not register for their programs. These 67 percent describe below how they would follow-up on this with more research.

How beneficial would it be to ask people why they did not register for your program?

50 percent of the 12 respondents thought it would be very beneficial to ask people why they did not register for the program. The other half though it would be somewhat beneficial. No respondents chose "Neutral", "Not very beneficial", or "Not beneficial."

Assuming it would be beneficial, how would you seek this information?

10 of the 12 respondents answered this question. All respondents agreed that the best way was to contact the people who did not attend through the following media: Telephone, direct mail, fax, focus group, or a personal visit. One planner emphasized the importance of a follow up study. "Survey people who did not attend. Carefully constructed questions are important."

Chapter 5

Summary and Interpretation

The author received 12 completed surveys of the 17 sent, a 70 percent return rate. A total of 14 surveys were returned but two surveys were not completed. Two respondents did not feel they were qualified as meeting planners to answer the survey. One commented on his incomplete survey. "Though I have planned some for profit programs for an association I belong to, I felt that my experience in this area was limited and I am returning the survey blank." Therefore, the total return rate was 82 percent despite the fact that two surveys were not completed.

Overall, the responses were sufficient to fulfill the study's purpose. As mentioned in Chapter Three, the basis for the study was to survey the top meeting planners in the industry. These individuals were chosen based on a June 1995 ranking in Meeting News as "The 25 Most Influential People in the Meetings Industry." The author wished to compile a

marketing guide for meeting planners on how to better market meetings and conferences.

Findings Related to Guide

The author attempted to find patterns in the areas of Communication, Direct Mail, Program Planning, Feedback/Evaluation, and Follow-up. Many methods are used by each planner and are outlined through the tables in Chapter Four.

Getting the Word Out

The use of "Direct Mail" as an independent sub-topic on the survey was appropriate. Direct Mail received the #1 ranking as the most effective way to market meetings. Direct Mail should be used frequently as it allows a complete presentation of offerings and detail. This is valuable for effective promotion.

The timing of mailings produced interesting results. Planners send mailings for different types of conferences with different lead times. The author concurs that there is no set time schedule that planners should follow with direct mailings because it is different for each type of meeting. This is consistent with recommendations provided in the research.

The question regarding second mailings showed a definite relationship between second mailings and color. Second mailings are recommended as a tool for reinforcement. However, planners feel that color lends itself to a quality

product and is vital to getting the word out in a second mailing.

Getting the Audience In

- Define target audience through membership lists.

Research is important in defining the target audience, through an analysis of industry, trade events and supplier sources.

- Determine attendee needs through evaluation forms and surveys.

- Use focus groups, membership surveys, responses to past evaluations, and industry trends.

Attendees plan for meetings one-two months in advance.

Registration begins within two weeks after receiving promotional material.

The author feels that one of the most valuable findings on the survey regarded the preferred attendee calendar format. Meeting planners find value in having information on attendees preferences because this may increase meeting attendance. The study found that there are variations in the preferred meeting times for types of meetings. These results will assist planners in future program planning. See the recommendation section in this chapter for further discussion on this topic.

- Use the Internet to market meetings.
- Create a home page.

- Use this home page to disseminate brochures and registration materials.
- Allow participants to register electronically.

Getting the Audience Back

- Use evaluation forms to plan future meetings.

Use that data to see what works and doesn't work. These evaluations will increase attendee satisfaction and improve the content of meetings.

- Send thank-you letters to attendees for good public relations.

Not too many planners do extensive follow-up with attendees after meetings. This follow-up is an excellent public relations technique for promoting future meetings.

Deficiencies

Problems with the survey became evident after tabulation and analysis. First, the author noted that many of the respondents did not answer questions as the researcher anticipated. For example, in questions with forced-answer choices, some of the respondents took the liberty to choose more than one answer. Therefore, in some of the questions, there are more than 12 reported answers. The results of the survey will coincide with the number of reported responses not the number of total respondents. This made tabulation difficult because the n was different for each question. The directions may not have been as clear to the planners as they

were to the author. The author assumed that the survey directions were clear because the meeting planners who field tested the survey for the author completed it without difficulty.

Many planners did not answer all the questions as the author had anticipated. Respondents seemed to pick and choose which questions they wanted to answer based on their experience or knowledge. Therefore, some of the surveys were incomplete. This was disappointing because the sample size was small and the author found difficulty making conclusions from a limited number of responses and incomplete surveys.

The small sample size would hinder the study because the author anticipated receiving all the surveys back because of the dissemination method. As mentioned in Chapter Three, the author sent all surveys to the prospective respondents by Federal Express Courier to ensure delivery and to indicate to the receiver the importance of the study. Despite the impressive 82 percent return rate, the author contends that the return rate is not as important as the quality of the responses.

This study could have surveyed a random sample of meeting planners (Meeting Professionals International, MPI membership) which might have yielded more responses. However, the latter study may not have obtained the thoughts and ideas of the most experienced meeting planners in the industry. The random sample may have obtained responses of

many inexperienced planners and therefore the data would not be as useful and conclusive. The author felt that it was worth taking a chance on a smaller sample size to have more qualitative results.

Recommendation

My first recommendation would be to conduct further research on several areas of the study-- in particular, in the area of study mentioned above in regard to attendee calendar format. The author recommends a follow-up survey of attendees and planners on this question. This would then allow for a comparison of the answers of planners and the actual registrants. Registrants are the ones who sign-up, so they should be also be surveyed.

Another interesting part of this study was, as mentioned before, the method of dissemination. It would be interesting to conduct this study again but to send the survey by regular mail instead of Federal Express. The number of responses to the survey by regular mail could then be compared to the number of responses received by Federal Express. This could open up a new area of study on methods of dissemination, communication and the analysis of the different methods. It would also confirm to the author if the expense of Federal Express caused the rate of return.

My second recommendation would be to conduct a follow-up study of the top meeting planners in the industry with similar questions. However, to ensure that all planners in

the study were appropriate for this study's purpose, it would be beneficial to contact the CEO or Board of Directors of Meeting Professionals International (MPI) and have them confirm the meeting planner choices for the study. This may eliminate the problem of surveys being returned because the planner did not feel they were qualified to return feedback. Even though all the planners were listed in a published article as the most influential meeting professionals in the industry, this study showed the author that it did not necessarily mean they were experienced in marketing meetings. They may have been the best in the industry but not in that specific subspecialty.

Finally, further research could be done on the follow-up portion of the survey. The author noted that many of the planners do not do extensive follow-up with attendees after a meeting. This survey did not reveal to the author the exact reason for this. It may be time constraints. But it would be interesting to confirm that hypothesis. A study could be conducted on the effectiveness of evaluation and follow-up after a conference. Methods of research for such a study could be valuable information for meeting planners across the country.

Overall, this study was instrumental in gathering many tips for marketing meetings: The following are the top 10 tips meeting planners should use as guidelines in marketing meetings:

1. Direct Mail should be used frequently as it allows a complete presentation of offerings and detail.
2. Send mailings with different lead times for different types of conferences.
3. Determine attendee needs through evaluation forms and surveys.
4. Use attendees' time frames and calendar preferences for programs to increase meeting attendance.
5. Use the Internet to market meetings.
6. Use research to define target audience.
7. Define target audience through membership lists.
8. Use color for second mailings as a tool for reinforcement.
9. Use thank-you letters as a public relations tool to promote future meetings.
10. Use evaluation forms to plan future meetings. Listen to what the audience recommends.

BIBLIOGRAPHY

Alonzo, Vincent "Convention Marketing: Remember the Bureau." Meetings & Conventions, Feb. 1992.

Burleson, Clyde W. Effective Meetings. New York: John Wiley & Sons, Inc., 1990.

Grimaldi, Lisa. "Upping the Numbers." Meetings & Conventions, August 1994.

Holtz, Herman. Marketing with Seminars and Newsletters. Westport: Quorum Books, 1986.

Priscilla Lynn and Tom Gorski. "1996 To Be Strongest Year for Meeting Professionals" (Press Release, Meeting Professionals International) June 26, 1995.

Simerly, Robert. Planning and Marketing Conferences and workshops: Tips, Tools, and Techniques. 1st ed. San Francisco: Jossey-Bass, 1990.

Staff of Meeting News "The 25 Most Influential People in the Meetings Industry." Meeting News, June 12, 1995.

Suleiman, Anver. "For Convention Success: Just Add Marketing." Association Management, Jan. 1995.

APPENDIX

41 Charles Lane
Cherry Hill, NJ 08003

November 17, 1995

Dear xy:

I am a graduate student in the public relations program at Rowan College of New Jersey. I am writing a thesis which is a study of the role of marketing on successful meeting planning. It will be a guide for meeting planners on how to better market meetings, conferences and workshops.

I have decided to include you in my study because of your listing in *Meeting News*' "The 25 Most Influential People in the Meetings Industry". I value and respect your opinion and ideas, as an authority in the meeting planning industry, and would appreciate your taking a few moments to complete the enclosed questionnaire. I have gone to the expense of sending this to you by Federal Express courier because the information it will provide is essential to the success of my study. At the conclusion of this project, you will receive a copy of my completed thesis. This thesis will be a handbook of recommendations, yours as well as those of your colleagues, who were listed with you in the *Meeting News* article.

Please answer the questions as completely as possible and return the survey in the provided self-addressed stamped envelope. For your convenience, I have included a larger envelope for any additional material you could offer relative to any area on the survey.

Because you are part of a representative sample, your responses are very important to the success of my study. You will not be identified by name in my thesis and I can assure that your responses will remain confidential.

Thank you again for your anticipated cooperation. If you have any questions or concerns, feel free to contact me at the number provided below. I look forward to your response.

Sincerely,

Erika March
(215)662-6877

E-Mail: March@oasis.rad.upenn.edu
Fax: (215)349-5925

Meeting Planning Survey

Thank you for completing this survey and returning it to Erika March. Your responses are greatly appreciated. Please return this survey to me in the provided self-addressed stamped envelope.

Getting the Word Out

Communication

1. Which of the following techniques do you use to market meetings?
(check all that apply)

- ☐ Direct Mail
- ☐ Internet
- ☐ Radio Ads
- ☐ Print Ads
- ☐ Faxes
- ☐ Telephone

2. Please rank the above 1-6 in order of importance. (1 being the highest)

- ___ Direct Mail
- ___ Internet
- ___ Radio Ads
- ___ Print Ads
- ___ Faxes
- ___ Telephone

3. Which of the above techniques do you believe are the most effective and why?
(use separate sheet if necessary)

Direct Mail and Mailing Lists

4. How early do you mail promotions for your meetings? Please check the appropriate box.

	12-24 months	9-11 months	6-8 months	3-5 months	1-2 months
Annual Conference					
Seminar					
Workshop					
Symposium					

5. In general, how many brochure mailings do you feel are necessary to get the word out?
- ☐ one
 - ☐ two
 - ☐ three
 - ☐ four
 - ☐ more than four

6. Are repeat mailings helpful?

☐ Yes (Explain)

☐ No (Explain)

7. If you do repeat mailings, how do you make your repeat mailings stand out from the first? (e.g. color, size, shape) (use separate sheet if necessary)

8. How do you update your in-house mailing lists? (use separate sheet if necessary)

9. Do you target past and potential attendees alike? (use separate sheet if necessary)

Getting the Audience In

Program Planning

10. How do you define your target audience? Please specify methods. (use separate sheet if necessary)

11. How do you determine your attendees needs? (use separate sheet if necessary)

12. In your experience, how early do attendees begin to plan for a meeting or conference?

- ☐ 12-24 months
- ☐ 9 -11 months
- ☐ 6-8 months
- ☐ 3-5 months
- ☐ 1-2 months

13. In your experience, how early do individuals begin to register after receiving promotional material for a meeting?

- ☐ Within a week
- ☐ Two weeks
- ☐ Three Weeks
- ☐ Four Weeks
- ☐ Five Weeks
- ☐ Six Weeks or More

14. Which of the following do you consider prior to program planning?
(Please rank 1-3 in order of importance, 1 being the highest)

- ___ Geographic data
- ___ Demographic data
- ___ Psychographic data

15. In your experience, what seems to be the preferred attendee calendar for meetings?

	Weekend (Saturday-Sunday)	Full Week (Monday-Friday)	Weekday (Monday-Tuesday)	Weekday (Thursday-Friday)
Annual Conference				
Seminar				
Workshop				
Symposium				

16. Please rank the following in order of importance in marketing meetings.
(please mark 1-5, 1 being the highest)

- ___ topic
- ___ reputation of organization
- ___ location
- ___ recreational activities
- ___ date

17. What is the most successful modernization you have seen in marketing meetings?
(use separate sheet if necessary)

18. How do you market a meeting site that is not well-known or easily accessible?
(use separate sheet if necessary)

Getting the Audience Back

Feedback/Evaluation

19. Following your meetings, do attendees complete evaluation forms?

☐ Always ☐ Sometimes ☐ Never

20. Do you use evaluations from past meetings to plan future meetings?

☐ Always ☐ Sometimes ☐ Never

21. Have these evaluations achieved any of the following?

Increased attendee satisfaction ☐ Yes ☐ No

Increased attendance ☐ Yes ☐ No

Topic ideas (improved topics) ☐ Yes ☐ No

Follow-up

22. Do you call attendees after a meeting to assess satisfaction?

☐ Always ☐ Sometimes ☐ Never

23. Do you send thank-you letters to attendees after a meeting?

☐ Always ☐ Sometimes ☐ Never

24. Does research tell you why people do not register for your programs?

☐ Yes ☐ No

25. How beneficial would it be to ask people why they did not register for your program?

- ☐ Very beneficial
- ☐ Somewhat beneficial
- ☐ Neutral
- ☐ Not very beneficial
- ☐ Not beneficial

26. Assuming it would be beneficial, how would you seek this information?

Thank you for taking the time to complete this evaluation form.